

Invoice Approval and Delivery

Datum	Ändrad av	Ändringar
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OVERVIEW OF INVOICE APPROVAL & DELIVERY

This document describes how the invoice approval & delivery process works.

In brief, the process comprises:

- 1- Customer setup: Choose the delivery method on the customer.
- 2- Invoice creation.
- 3- Approve one Invoice : click on “Approve” button on the invoice for approval & email
- 4- Approve several invoices: mark all invoices to be approved in one go.

Customer Setup

- 1- Choose the delivery method of the invoice on the customer (Communication tab).
For the invoices to be sent electronically choose ‘eInvoice (via External Service)’

The screenshot shows a software interface with a top navigation bar containing tabs: Relationships, Communication, Address, Sales, Marketing, Support, and Financial. The 'Communication' tab is selected. Below the tabs, there is a dropdown menu labeled 'IAD INVOICE DELIVERY METHOD'. The dropdown is open, showing a list of options: '- New -', 'eMail to Customer (via Netsuite)', 'eMail to Customer (via External Service)', 'eInvoice (via External Service)', 'Manual', and 'Print and Post (via External Service)'. Below the dropdown, there are three buttons: 'Fax', 'Refresh', and 'View History'. At the bottom, there is a table with columns labeled 'AUTHOR', 'RECIPIENT', and 'SUB'. The table is currently empty, with the text 'No records to show.' displayed below it.

Invoice creation

- 1- All invoices created will have the status 'Pending Approval', regardless of how they are created.
- 2- The IAD Delivery Method will be inherited from the customer to the invoice.

Individual Invoice Approval

- 1- Open the invoice you want to approve & email
- 2- Click on the “Approve” button
- 3- The invoice approval status will be changed to “Approved”
- 4- The invoice status will be changed to “Open”.
NOTE: If the invoice’s status does not change to “Open” after clicking on the “Approve” button, please look for the reason in the field IAD INVOICE APPROVAL MESSAGE on the header of the invoice.

Bulk Invoice Approval

- 1- Using an Economy role, navigate to Accounting -> Invoicing -> Approve Invoices
- 2- In the Action field, choose Pending Approval → Approve (IAD Invoice Approval and Delivery)
- 3- In the View field, choose “Invoices for Approval”

Approve Invoices

ACTION

Pending Approval → Approve (IAD Invoice Approval and Delivery) ▼

VIEW

IAD Invoices for Approval ▼

SELECT	DATE	DOCUMENT NUMBER
No records to show.		

- 4- Check the check box for the invoices that you want to approve & email
- 5- Click on “Submit”.

- 6- The chosen invoices will be approved and the invoices marked to be delivered as 'eInvoice (via External Service)' will be sent electronically.